

The Program Report is designed to monitor compliance with program requirements by Developments participating in the various programs administered by Florida Housing. The following instructions are to be used when completing the Program Report. *This form is to be completed by the owner or an authorized representative.*

Line-by-Line Instructions

Program Report Recap of Tenant Income Certification Information

The Program Report Recap of Tenant Income Certification Information (Recap) is a snapshot of a Development’s unit utilization and contains information from the most recent Tenant Income Certification for each qualified household in residence as of the ending date of the reporting period.

Refer to the Reporting chapter of the Compliance Handbook for submission requirements.

Heading:

Development Name	Enter the name of the Development.
Total Units	Enter the total units in the Development including Exempt units and Model units.
County	Enter the name of the county in which the Development is located. <i>For example, Miami-Dade rather than Miami-Dade County</i>
Reporting Period	
From	Enter the beginning date (month, day and year) of the period the Report covers.
Through	Enter the ending date (month, day and year) of the period the Report covers.
Key Number	Enter the identification number issued by Florida Housing that is unique to each Development. Does NOT vary according to FHFC program participation of Development.
Date Prepared	Enter the date the Report is prepared.
Prepared by	Enter the name of person who prepared the Report.
Preparer's E-mail Address	Enter the e-mail address of the person who prepared the Report
Preparer's Telephone	Enter the telephone number (including area code) and extension number if applicable, of the person who prepared the Report.

Body of the Program Report -- Recap of Tenant Income Certification (Recap) Worksheet

Col. 1	a	Local Building Designation or Federal BIN	<p>Developments that are not HC program participants: Enter the local building designation on each row, in local building designation sequence.</p> <p>The local building designation is the alpha/numeric designation made by the building owner. If the owner has made no designation enter the number from the street address of the building.</p> <p>HC program participants: Enter the HC Building Identification Number (BIN) on each row, in BIN sequence. If the BIN has not yet been issued by Florida Housing, enter the local building designation and arrange the report according to local building designation sequence. The local building designation shall be replaced by the BINs upon their issuance by Florida Housing and, if necessary, the Program Report sequence revised.</p> <p>Do not leave blank rows between buildings/BINs.</p> <p>Management units that are not located within one of the rental buildings shall appear on row 1 of the Recap form unless alternate placement is approved by Florida Housing or the Compliance Monitor.</p>
	b	Unit Identification	<p>Enter the address identification information for each unit, in alpha-numeric unit-number sequence within each building. This information can be simply the unit number or, when the unit number is not unique within the Development, the unit identification may be a combination of the local building designation and the unit number. Unit identification may also be a combination of the number from the street address and the unit number.</p> <p><i>Examples:</i> <i>ABC Villas, Bldg 1, 1199 Main Street, Unit 101</i></p> <p><i>101</i> - No other unit in development numbered 101 <i>1-101</i> - Uses local building designation <i>1199-101</i> - Uses number from the street address <i>(do not enter street name)</i></p>

Col. 2	Household Name or Unit Classification Code	
	Occupied Set-Aside Units	<p>Occupied units: Enter the last name of the head of household.</p> <p>The Household Name shall remain the same for the duration of the residency of the original head of household. If upon Annual Recertification the original head of household has departed, enter the last name of the remaining member who becomes head of household and this name shall remain the Household Name for the duration of the residency of the subsequent head of household.</p>
	Unoccupied Set-Aside Units	<p>Unoccupied units: Enter V.</p> <p>These are units that were most recently occupied by a certified (qualified) household for at least 31 days. The unit is counted as a vacant certified unit until such time as the unit is reoccupied. Upon reoccupancy the AMI percentage category and other qualification factors of the unit are redetermined based on the new household's Total Household Income from All Sources and other eligibility criteria required by the Florida Housing Regulatory Agreement.</p> <p>Units cannot be left permanently vacant and continue to satisfy the set-aside requirements. The owner representative shall be able to document attempts to rent the vacant units to income-eligible households.</p> <p>Unoccupied units that are not habitable have additional coding requirements. Refer to instructions for the Other column of the Program Report Recap of Tenant Income Certification Information.</p> <p>This code is not applicable to Developments that participate in only the HOME program with Florida Housing; refer to Other Vacant (OV) below.</p>
	Exempt Management	<p>Occupied units: Enter EM.</p> <p>Unoccupied units: Enter EMV. These are units that were most recently occupied by an exempted management household.</p> <p><i>NOTE: Developments having a certification requirement totaling less than 100 percent of the units in the Development shall place management unit(s) in the non-set aside portion of its units.</i></p>

	Exempt Security	<p>Occupied units:</p> <p>Unoccupied units:</p> <p><i>NOTE: Developments having a certification requirement totaling less than 100 percent of the units in the Development shall place security unit(s) in the non-set aside portion of its units.</i></p>	<p>Enter ES.</p> <p>Enter ESV. These are units that were most recently occupied by an exempted security household.</p>
	Market Unit	<p>Occupied Units:</p> <p>Unoccupied units:</p>	<p>Enter MR. The name of the non-certified household <i>IS NOT</i> listed.</p> <p>Enter MRV. These are units that were most recently occupied by a non-certified household.</p> <p>If the unit failed to meet Uniform Physical Condition Standards following move out, the unit is also coded as U0 in Column 11 Other.</p>
	Model	Unoccupied units:	Enter M.
		<p>(1)</p> <p>(2)</p> <p>(3)</p>	<p>Model units shall not be occupied and shall be available at all times for viewing by prospective residents.</p> <p>Developments having a set-aside requirement totaling less than 100 percent shall place the model units in the non-set aside portion of its units.</p> <p>Model units are not permitted in Housing Credit developments having a set-aside requirement totaling 100% of the units in the development.</p>
	Never Rented	Unoccupied units:	Enter NR. These are units that have never been used or occupied by any household (certified or non-certified).
	Other Use	Unoccupied units:	Enter O. These are units approved by Florida Housing for other uses.
	Other Vacant	<p>Unoccupied units:</p> <p><i>NOTE: These are unoccupied unit where the most recent household:</i></p> <p>(1) was properly certified but did not occupy the unit for at least 31 days, or</p> <p>(2) <i>was not properly certified.</i></p> <p><i>This designation includes:</i></p>	Enter OV.

		<p>(a) Units previously occupied by certified (qualified) households whose certification expired prior to move out and a required income Recertification was not completed prior to move out. These units are also coded as NC in Column 11 Other.</p> <p>(b) Units previously occupied by qualified (certified) households, however, unit failed to meet Uniform Physical Condition Standards following move out. These units are also coded as UO in Column 11 Other.</p> <p><i>If a Development participates only in the HOME Program unoccupied units that were most recently occupied by HOME-assisted households are coded as OV in this column and coded as HV in Column 11 Other.</i></p>
Col. 3	Move-In, Initial Cert, or Move-Out Date	<p>Enter this information for ALL units/households (certified or non-certified).</p> <p>Occupied units: Enter the date that the household first occupied the unit.</p> <p>If a qualified (certified) household first occupied the unit prior to the Development's participation in a Florida Housing program enter the effective date of the first Florida Housing certification executed by the household. Participants with USDA Rural Development (RD) funding or project-based HUD Section 8 assistance shall execute a Florida Housing Tenant Income Certification at initial certification; subsequent recertification may be according to the schedule established by RD or HUD.</p> <p>Unoccupied units: Enter the household move-out date.</p>
Col. 4	Next Recert Due Date	<p>Enter the full date (month/day/year) that the next Annual Recertification is due.</p> <p><i>Leave blank if future annual income determination is not required.</i></p>
<p>NOTE for Column 5 and Columns 7 through 13</p> <p><i>Developments that are required to perform an annual income determination of existing households shall update this data each year from the Annual Recertification Tenant Income Certification. Developments that are not required to annually determine income of existing households shall retain the information from the last certification.</i></p>		
Col. 5	Most Recent Income Certification	

	a	Effective Date	Enter the effective date (month/day/year) of the current Initial Certification or Annual Recertification Tenant Income Certification.
	b	Type (IC / AR)	Enter IC (Initial Certification) or AR (Annual Recertification) to indicate the Tenant Income Certification type.
	c	Attached (Y)	Enter a Y if a copy of the household's TIC is included with the Program Report submitted to the Compliance Monitor.
Col. 6	Are ALL Occupants Full-Time Students? Household student status shall be determined at least annually.		
	a	(Y or N)	Indicate the Full-Time Student status of the household. If ALL household members ARE full-time students, enter Y (yes). If ANY household member is not a full-time student, enter N (no).
	b	Explanation (# / NA)	If a household is comprised entirely of full-time students but qualifies for an exception, enter the applicable explanation code number: <ul style="list-style-type: none"> 1 TANF assistance 2 Job training program 3 Single parent / dependent child 4 Married / joint return 5 Former foster child in transition N/A Household is not a full-time student household. <i>NOTE: A student is a person carrying a subject load considered full-time by the educational institution being attended, or who will be a full-time student at an educational institution during five (5) months of the calendar year.</i>
Col. 7	Number of Household Members		
	a	Total	Enter the total number of household members that occupy the unit. Live-in attendants and foster children or adults are not counted as household members.
	b	With Income	Enter the number of household members that have income that is included in the Total Household Income from All Sources.
	c - f	By Age	Enter the number of household members in the column (c through f) that corresponds to the ages of the members. <i>Leave blank if there are no household members in a particular age group category.</i>

Col. 8	Total Household Income from All Sources	Enter the exact amount of the verified Anticipated Gross Annual Aggregate Household Income for the household.
Col. 9	Income Limit	<p>Enter the maximum allowable income applicable to the program(s) and set-aside requirements of the Development and the number of persons in the household at the time the current Tenant Income Certification was executed. This figure IS NOT updated in midterm when HUD redetermines Income Limits.</p> <p>Refer to Appendix A for the Income Limit schedules. The schedules are also available from the Property Owners & Managers menu at the Florida Housing web site: www.floridahousing.org.</p>
Col. 10	AMI Percentage Category of Certified Units (Occupied and Vacant)	Enter the AMI percentage category of the most restrictive income category for which the household qualifies according to the set-aside requirement applicable to the development in the Florida Housing Regulatory Agreement.
Col. 11	a	Other
	CAP	Household exceeds 140% cap at recertification.
	CH	HOME-Assisted household exceeds 80% cap at recertification.
	HV	An unoccupied unit that was most recently occupied by a household that met the applicable requirements for the HOME program. Units do not apply toward compliance with the Development's HOME-Assisted unit requirement.
	LINK	A unit occupied by a special needs household receiving community based supportive services who was referred by a designated supportive services agency in the community where the development is located. When a special needs household vacates the unit, the LINK designation is retained until reoccupancy at which time the unit will be designated based on the LINK status of the new household.
	NB	Non-bond -- Unit in a multiple-program Development that does not qualify for the MMRB program.
	NC	Not Properly Certified -- Designates a unit for which the most recent Initial Certification or Annual Recertification has expired and the required Annual Recertification has not been executed.

	PPC (MMRB)	<p><i>Complete only when required in the Florida Housing Regulatory Agreement.</i></p> <p>PPC indicates a unit that fulfills a Public Purpose Criteria requirement found in the Development's Regulatory Agreement. Enter the appropriate code to further designate the PPC type satisfied by the unit. Leave blank if the Regulatory Agreement does not contain a PPC requirement.</p> <p># Bedrooms Certified (occupied or unoccupied) unit that satisfies the PPC requirement for setting aside units according to the number of bedrooms in the unit.</p> <p> /0</p> <p> /1</p> <p> /2</p> <p> /3</p> <p> /4</p>
	SPND	<p>A unit occupied by a special needs household that meets the Special Needs Household definition according to the Florida Housing regulatory agreement applicable to the development but that was not referred by a designated supportive services agency and is, therefore, not designated LINK. When the special needs household vacates the unit, the SPND designation is retained until the unit is reoccupied at which time the unit will be designated according to the SPND status of the new household.</p>
	UO	<p>An unoccupied unit that is not habitable and is unsuitable for occupancy.</p>
	XR	<p>Designates a unit which as a result of USDA RHS requirements pays rent in excess of the applicable Section 42 maximum. The excess rent shall be paid to USDA under Section 515 of the Housing Act of 1949 and shall not be retained by the development. By entering this code the owner indicates that the excess rent remittances are being made to USDA.</p>
b	Referral Agency Number	<p>When 11a includes LINK, enter the 3-digit number applicable to the designated supportive services agency which referred the household</p>

Col. 12	Demographic Category or Special Set-Aside	<p><i>Complete only when shown in the Regulatory Agreement.</i></p> <p>Select the demographic category, target and/or special set-aside category for which the household qualifies according to the set-aside requirement in the Florida Housing regulatory agreement applicable to the development. Leave blank if the regulatory agreement does not contain a demographic or special set-aside requirement or target.</p>
Col. 13	a	<p>HOME Rent Type</p> <p>Select the appropriate designation to indicate the HOME rents the household is paying - Low, High, or FMR.</p>
	b	<p>Rent AMI Category</p> <p><i>HC, HUD Risk Sharing, RRLP, and SAIL Developments</i></p> <p>Enter the AMI percentage category of the rent category according to the HC, HUD Risk Sharing, RRLP, and/or SAIL program set-aside requirement applicable to the development.</p>
Col. 14	a	<p>Number of Bedrooms in Unit</p> <p>Enter the number of full bedrooms in the unit. Enter a zero (0) when the unit is an efficiency, studio, or single room occupancy (SRO). When a bedroom is designated as Individual Room Occupancy (IRO), enter IRO; do not enter the total bedroom count of the unit from which the IRO originated. If any bedroom in a unit is designated as an IRO unit, every bedrooms in that unit must be designated an IRO unit. Once a bedroom is designated as an IRO unit, it shall function as such during the entire regulatory period.</p> <p>NOTE: Enter for all occupied and vacant units in the Development regardless of the status or unit classification type.</p>
<p>Columns 14b through 14d shall be updated with information from the most recent Tenant Income Certification if the household is subject to annual income determination; information for other households shall be updated on the anniversary of the move-in date.</p>		
	b	<p>Household Paid Rent</p> <p><i>Certified (qualified) households only:</i></p> <p>Enter the dollar amount the household actually pays in rent. Include the amount of any non-optional fees paid by the household.</p> <p>This figure IS NOT updated to reflect midterm changes in unit rent or the utility allowance amount.</p> <p>If the household receives rental assistance enter only the portion the household actually pays. If the household received a utility reimbursement as a result of the rental assistance payment, enter the amount of the utility reimbursement as a negative amount.</p>
	c	<p>Rental Assistance</p> <p>Enter the dollar amount of rental assistance received by the household. Leave blank if no rental assistance is received.</p> <p>This figure IS NOT updated to reflect midterm changes in unit rent or the utility allowance amount.</p>

	d	Tenant or Project Based Rental Assistance	If the household receives rental assistance, select Tenant or Project to indicate the assistance type being received. Leave blank if no rental assistance is received.
Columns 15 through 17 shall be updated with information from the most recent Tenant Income Certification if the household is subject to annual income determination; information for other households shall be updated on the anniversary of the move-in date.			
Col. 15		Utility Allowance (HC, HOME, HUD Risk Sharing)	Enter the amount of the applicable monthly utility allowance for each unit at the time the current Tenant Income Certification was executed. This figure IS NOT updated for midterm changes in the utility allowance amount.
Col. 16		Total Tenant Payment	Enter the sum of the Household Paid Rent (Col. 14b) and the Utility Allowance (Col. 15).
Col. 17		Rent Limit	Enter the maximum allowable rent applicable to the program(s) and set-aside requirements of the Development. This figure is not updated in midterm when HUD redetermines income limits and the revised rent limits are promulgated. Refer to Appendix B or Appendix C for the Rent Limit schedules. The schedules are also available from the Property Owners & Managers menu at the Florida Housing web site: www.floridahousing.org .

Florida Housing Finance Corporation Statistical Data Collection

The following columns apply to all qualified (certified) households, both at Initial Certification and at subsequent recertification. When a household is not subject to ongoing annual income determination, include rent concession information for the current lease term and retain characteristics data from the most recent certification.

Col. 18	Rent Concession		
	a	Total Amount	Enter the total dollar value of the rent concession, if any, over the term of the current lease.
	b	Lease Term (in months)	Enter the number of months in the current lease term. Enter a one (1) if the tenancy is month to month.
Characteristic Information by Number of Persons in Household Information concerning the race or ethnicity of the residents is being gathered for statistical use only. No resident is required to give such information unless they desire to do so; refusal to give such information will not affect any rights they have as a resident.			
Col. 19	a	Household Elected to Not Participate	Enter X if the household elected not to provide information.

	b - w	By Race and by Hispanic Ethnicity	<p>Enter the total number of household members in each racial category.</p> <p>Within each racial category indicate the total number of Hispanic or Latino household members.</p> <p><i>Leave blank if there are no household members in a particular group/category.</i></p>
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The following columns apply to new qualified (certified) households at Initial Certification (only). Retain the information upon the anniversary income determination or Annual Recertification.

Col. 20	Enter information pertaining to the individual household member shown as head of household on the Tenant Income Certification.		
	Prior Housing Information		
	Monthly Pmt Amt		
	a	Rent	Enter the dollar amount of rent paid at the most recent prior residence.
	b	Mortgage	Enter the dollar amount of the mortgage payment at the most recent prior residence.
	c	ZIP Code	Enter ZIP code of the most recent prior residence
	Current Employment		
	d	Occupation	Select the current occupation from the drop-down list.
	e	ZIP Code	Enter the ZIP code of current employment location
	f	Primary Transportation Mode	Enter the primary mode of transportation, for example, vehicle, public transportation, or other.
Col. 21	a	Receives Medicare Benefits	Enter an X if any member receives Medicare benefits.
	b	Received Medicaid Benefits	Enter an X if any member receives Medicaid benefits.
	c	Is a Person With a Disability	Enter an X if any member is a person with a disability.

Program Report Summary Sheet

The Summary Sheets summarize the data entered on the Recap of Tenant Income Certification Information (Recap) form.

DATA INPUT NOTE: Most are formulated fields. Enter data only in columns with blue-shaded column headings. Columns with unshaded headings contain formulas that function once the blue-shaded columns are filled.

Heading:

a	Reporting Period	
	From	Enter the beginning date (month, day and year) of the period the Report covers.
	Through	Enter the ending date (month, day and year) of the period the Report covers.
b	Development Name	Enter the name of the Development.
c	Key Number	Enter the identification number assigned by Florida Housing that is unique to each Development. Does NOT vary according to FHFC program participation.
d	Total Units	Enter the total units in the Development including Exempt units and Model Units.
e	County	Enter the name of the county in which the Development is located.
f	Date Prepared	Enter the date the Report is prepared.
g	Prepared by	Enter the name of person who prepared the Report.
h.	Preparer's E-mail Address	Enter the e-mail address of the person who prepared the Report.
i	Preparer's Telephone	Enter the telephone number (including area code) of the person who prepared the Report.

Body of the Summary Worksheet

PART 1: CERTIFIED UNIT DETAIL		
A	AMI Percentage Category	<p>Enter the AMI percentage categories that are applicable to the Development according to the set-aside requirements applicable to the development in the Florida Housing Regulatory Agreement for the program with the most restrictive requirements. AMI percentage categories must be entered in the sequence of lowest percentage category to highest percentage category.</p> <p>Example: <u>HC Set-Aside Requirement</u> 10% of Units at 30% AMI 10% of Units at 50% AMI 80% of Units at 60% AMI</p> <p><u>SAIL Set-Aside Requirement</u> 20% of Units at 50% AMI 80% of Units at 60% AMI</p> <p>Enter according to the HC Set-Aside Requirement due to the 30% AMI requirement. The HC units qualified at 30% AMI meet the SAIL requirement at 50%.</p>
B	Occupied	<p>Enter the number of occupied set-aside units broken out by AMI percentage category.</p> <p>From Recap Column 10 [Certified Units by AMI Percentage Category].</p>
C	<p>Certified Vacant</p> <p><i>(Does not apply to HOME – refer to column 10 instructions for treatment of-HOME Vacant units)</i></p>	<p>Enter the number of certified vacant units broken down by previous-use AMI percentage and, when applicable, by demographic or special set aside type.</p> <p>Total of units denoted with V in Recap Column 2 [Household Name or Unit Classification Code] according to Column 10 [Certified Units by AMI Percentage Category].</p>
D	Total by AMI Category	Enter the total of certified units (occupied and vacant) for each AMI category.
	TOTAL OCCUPIED	Enter the sum of the occupied certified units from column B for all AMI categories.
	TOTAL CERTIFIED VACANT	Enter the sum of the unoccupied certified units from column C for all AMI categories.
	TOTAL CERTIFIED UNITS	Enter the sum of TOTAL OCCUPIED and TOTAL CERTIFIED UNITS to arrive at the total of the certified units from all AMI categories.

PART 2: NON-CERTIFIED UNIT DETAIL	
B	<p>NUMBER OF OCCUPIED UNITS Enter the number of occupied units broken out by occupancy type.</p>
	<p>Exempt Management (EM) Enter the total number of units that have been approved by Florida Housing for exemption from income certification requirements and that are occupied by a full-time employee of the Development. Total of units denoted with EM in Recap Column 2 [Household Name or Unit Classification Code].</p>
	<p>Exempt Security (ES) Enter the total number of units that have been approved by Florida Housing for exemption from income certification requirements and that are occupied by a Security Officer. Total of units denoted with ES in Recap Column 2 [Household Name or Unit Classification Code].</p>
	<p>Market Units (MR) Enter number of units occupied by non-certified households (including management units in developments with a set-aside requirement totaling less than 100 percent). Total of units denoted with MR in Recap Column 2 [Household Name or Unit Classification Code].</p>
	<p>Never Rented (NR) Does not apply to occupied units.</p>
	<p>Occupied: Noncertified (NC) Enter number of units occupied by households that were found not to be properly certified. Used at the direction of the Compliance Monitor. Total of units denoted with NC in Recap Column 11 [Other].</p>
	<p>Model Does not apply to occupied units</p>
	<p>Other Does not apply to occupied units</p>
C	<p>NUMBER OF VACANT UNITS</p>
	<p>Exempt Management (EMV) Enter the total number of vacant units previously approved by Florida Housing for exemption from income certification requirements and most recently occupied by a full-time employee of the development (EMV).</p>
	<p>Exempt Security (ESV) Enter the total number of vacant units previously approved by Florida Housing for exemption from income certification requirements and most recently occupied by a Security Officer (ESV).</p>

	Market Units (MRV)	Enter number of vacant units most recently occupied by non-certified households (those paying market rent as well as management units in developments with a set-aside requirement totaling less than 100 percent). Total of units denoted with MRV in Recap Column 2 [Household Name or Unit Classification Code].
	Never Rented (NR)	Enter the total number of units which have never been occupied (except models). Total of units denoted with NR in Recap Column 2 [Household Name or Unit Classification Code].
	Vacant: Other (OV)	Enter number of vacant units not otherwise classified. Total of units denoted with OV in Recap Column 2 [Household Name or Unit Classification Code].
	HOME Program Note:	For Developments that participate only in the HOME Program, count vacant units that were most recently occupied by HOME-assisted households (also refer to instructions for column 11).
	Model (M)	Enter the total number of model units. Total of units denoted with M in Recap Column 2 [Household Name or Unit Classification Code].
	Other Use (O)	Enter the total number of apartment units approved for other uses. Total of units denoted with O in Recap Column 2 [Household Name or Unit Classification Code].
D	Non-Certified Units Total	
	Exempt Management	Sum the occupied and vacant units.
	Exempt Security	Sum the occupied and vacant units.
	Market Units	Sum the occupied and vacant units.
	Never Rented	Does not apply.
	Occupied: Noncertified Vacant: Other	Does not apply.
	Model	Does not apply.
	Other	Does not apply.
	TOTAL OCCUPIED	Enter the sum of the occupied units from column B for all non-certified categories.
	TOTAL VACANT	Enter the sum of the unoccupied units from column C for all non-certified categories.
	TOTAL NON-CERTIFIED	Enter the sum of TOTAL OCCUPIED AND TOTAL VACANT UNITS to arrive at the total units for all non-certified categories.

PART 3: DEVELOPMENT TOTALS SUMMARY		
B	TOTAL OCCUPIED	Enter the sum of Certified Occupied and Non-Certified Occupied.
C	TOTAL VACANT	Enter the sum of Certified Vacant and Non-Certified Vacant.
D	TOTAL UNITS	Enter the sum of TOTAL OCCUPIED and TOTAL VACANT.
E	PERCENT OCCUPIED	Divide TOTAL OCCUPIED by TOTAL UNITS.

PART 4: SET-ASIDE PERCENTAGES BY PROGRAM	
Items F, G, H, I, and J	
<p>Developments participating in multiple programs will enter the percentage of units qualified in each applicable AMI category according to the requirements of the individual program. Units counted toward a more restrictive requirement for one program may count toward a less restrictive requirement for an additional program.</p>	
AMI Percentage Category	Enter (on a program-by-program basis) the Development's applicable AMI percentage categories.
Actual Set-Aside Units/ Actual HOME-Assisted Units	Enter (on a program-by-program basis) the number of units actually set aside in each applicable AMI percentage category.
Set-Aside Percent Required	Enter (on a program-by-program basis) the percentage of units required to be set aside in each applicable AMI percentage category.
Actual Set-Aside Percentage	Enter (on a program-by-program basis) the percentage of units actually set aside in each AMI percentage category.
TOTAL	Enter (on a program-by-program basis) the sum of the Actual Set-Aside Percentage.

Program Report Summary Sheet (continuation)		
PART 5: HOUSING CREDIT SET-ASIDE PERCENTAGES		
By Building Identification Number (BIN)		
A	Building Identification Number (BIN)	Enter, <i>in BIN sequence</i> , the Federal BINs issued to the development. Only buildings that have set-aside requirements shall be included.
B	Set-Aside Percentage Required	Enter the percentage requirement for certified Lower-Income households for each BIN.
C	Actual Set-Aside Percentage	Enter the percentage of certified Lower-Income households attained for each BIN.

PART 6: PUBLIC PURPOSE CRITERIA (PPC) MMRB Only		
A	Number of Units Certified	Enter, on a PPC-by-PPC basis, the number of lower-income certified units (both occupied unoccupied) satisfying the applicable PPC. Total of units denoted with applicable PPC designation in Recap Column 11 [Other].
B	Number of Units Reserved	Enter, on a PPC-by-PPC basis, the number of lower-income certified vacant units being held to satisfy the applicable PPC. Total of units denoted with applicable PPC Reserved designation in Recap Column 11 [Other]
C	TOTAL	Enter the sum of the certified and reserved units for each applicable PPC category.

PART 7: HOME PROGRAM RENTS		
Number of Units by HOME Rent Type Category		
A	Occupied	Enter, on a HOME Rent Type Category basis, the number of occupied units that meet the applicable requirements. Totals from Recap Column 13a [HOME Rent Type].
B	Vacant (HV)	Enter, on a HOME-Rent Type basis, the number of vacant units that previously met the applicable requirements. Total of units denoted with HV in Recap Column 10 [Other] according to applicable designation from Recap Column 13a [HOME Rent Type]. <i>NOTE: If a Development participates only in the HOME Program these units shall also be denoted as Other Vacant (OV) in Recap Column 2 [Household Last Name or Unit Classification Code].</i>
C	TOTAL	Enter the sum of the occupied and vacant HOME-assisted units for each applicable HOME Rent category.

PART 8: DEMOGRAPHIC CATEGORY OR SPECIAL SET ASIDE GROUP		
A	Set-Aside Requirement Type	Enter the Development's applicable Demographic Category or Special Set Aside Requirement types.
B	Set-Aside Percentage Required	Enter the Development's required set-aside percentages for each applicable Demographic Category or Special Set Aside Requirement type.
	TOTAL Set-Aside Percentage Required ⁰	Enter the total percentage of units required to be set aside <i>on a category or requirement type basis</i> , i.e., Elderly – 80%, No Designated Target – 20%, etc.
C	Number of Units	<p>Enter the total of certified units (occupied and vacant) <i>on a requirement type basis</i>, i.e., Elderly - 30 units, No Designated Target - 10 units, etc.</p> <p>Developments participating in multiple programs and having differing Demographic Categories or Special Set-Aside Requirements from program to program shall enter the figures for each program separately and identify to which program each figure applies.</p> <p><i>Do not include HV units in HOME figures.</i></p> <p>Totals from Recap Column 10 [Certified Units by AMI Percentage Category] according to applicable designation type denoted in Recap Column 12 [Demographic Category or Special Set Aside].</p>
	TOTAL Number of Units	Enter the sum of the certified units by Demographic Category or Special Set-Aside Requirement type.
D	Actual Set-Aside Percentage	Enter the total percentage of units (occupied and vacant) certified <i>on a category or requirement type basis</i> , i.e., Elderly – 80%, No Designated Target – 20%, etc.
	TOTAL Actual Set-Aside Percentage	Enter the sum of the certified units by Demographic Category or Special Set-Aside Requirement type.

PART 9: HOUSEHOLD CHARACTERISTICS INFORMATION		
A	AVERAGE HOUSEHOLD INCOME	Divide the Total Household Income by the Total Number of Persons with Income and enter the amount on the applicable line.
B	AVERAGE TENANT-PAID RENT	For each unit type, divide the Total Household Paid Rent by the Total Number of (occupied) units of each unit type and enter the amount on the applicable line.
C	HOUSEHOLD CHARACTERISTICS INFORMATION (racial category)	Enter the number of households that elected to not participate.
		Enter the total number of household members in each racial category.
		Enter the total number of Hispanic or Latino household members.
D	HOUSEHOLD CHARACTERISTICS INFORMATION (age group)	Enter the total number of household members in each age group.

PART 10: OCCUPANCY AND VACANCY INFORMATION BY UNIT TYPE		
A	Certified Occupied by Number of Bedrooms and by AMI Percentage Category	Enter the AMI percentage categories that are applicable to the Development for the program with the most restrictive requirements. Enter (on a unit type basis) the number of certified occupied units by AMI percentage category.
B	Certified Vacant by Number of Bedrooms and by AMI Percentage Category	Enter the AMI percentage categories that are applicable to the Development for the program with the most restrictive requirements. Enter (on a unit type basis) the number of certified vacant units by AMI percentage category.
C	Occupied and Vacant Market Rent Units by Number of Bedrooms	Enter (on a unit type basis) the number of occupied market rent (MR) units and enter the number of vacant market rent (MRV) units.